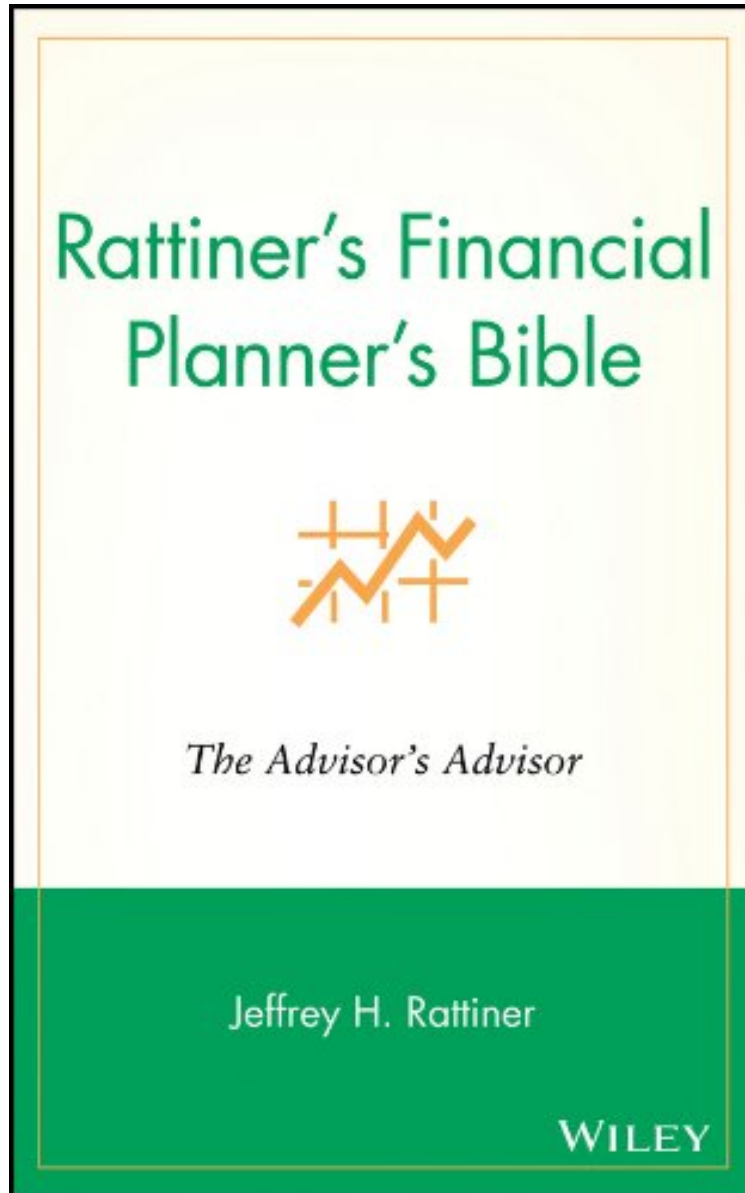


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Rattiner's Financial Planner's Bible: The Advisor's Advisor

Jeffrey H. Rattiner

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Jeffrey H. Rattiner : Rattiner's Financial Planner's Bible: The Advisor's Advisor before purchasing it in order to gauge whether or not it would be worth my time, and all praised Rattiner's Financial Planner's Bible: The Advisor's Advisor:

0 of 0 people found the following review helpful. pretty goodBy LBDthis is a decent, well-rounded "bible" for financial planners. would have preferred a little more meat in the marketing section, a little more depth. and the other reviewer is correct about the need for better editing.1 of 3 people found the following review helpful. Rattiner knows

his stuffBy CustomerAn accomplished professional, Rattiner knows his stuff. Worthwhile investment for those starting out in the financial services arena. 16 of 18 people found the following review helpful. Valuable Tools for Experienced AdvisorsBy Edwin P. MorrowThis is an excellent successor to Jeff's earlier book on getting started in financial planning. There is great material, but because every reader has a substantially different background, a lot of it is not immediately applicable. But the critical issue is that SOME of the very well organized checklists and tools will be precisely what the reader needs, and needs now. Some of the Bible will be very useful later. The firm-wide self-assessment survey is a great tool, as is the model business plan.

"Jeff Rattiner has found another way to help producers. This book is a must-have for financial advisors, especially those that aspire to be Million Dollar Producers." -Thomas B. Gau, CPA, CFP President and CEO of Million Dollar Producer "Jeff Rattiner has done it again! His book displays all the essential tools and techniques necessary for advanced planners to succeed in this business. Rattiner's easy-to-read style provides the best in marketing and practice management ideas. This book will help you if you have hit a dead end in your practice. Rattiner tells it like it is by providing a no-nonsense approach to truly taking your practice to the next level. A must-read for the serious financial advisor." -Jim Cannon, President, SunAmerica Securities, Sentra Securities Corporation, and Spelman Co., Inc. Financial planners provide a variety of services to an array of clients but lack a uniform system for creating a profitable business. Rattiner's Financial Planner's Bible: The Advisor's Advisor collects best practices from the nation's leading financial planners, presenting a prototype turnkey model for achieving financial success for both the client and the practice. Financial planning expert Jeffrey Rattiner emphasizes an ethical, practical approach to financial advising, placing paramount importance on "doing what's best for the client." Drawing on extensive interviews and his own experience, Rattiner delivers can't-miss tips on marketing a financial planning practice, developing an infrastructure, crafting strategic alliances, assessing a business's profitability, and creating the model twenty-first-century practice. This authoritative guide also covers: * Forming a planning advisory board * Establishing a realistic chain of command * Delegating responsibility * Making technology work for you * Charging clients appropriately Running a financial planning business need not be an exercise in trial and error. Rattiner's Financial Planner's Bible delivers a compelling model for advising success.

From the Inside FlapAre you at a crossroads in your practice? Have you taken it as far as you can go unassisted? Are you looking keenly for advanced direction in marketing and practice management areas that you haven't tried yet and don't know where to turn to acquire that kind of information? Is your organizational structure and staff sound? In short, are you looking to take your practice to the next level and need some guidance? If the answer to any of these questions is yes, then you will want to read Rattiner's Financial Planner's Bible: The Advisor's Advisor. Rattiner's Financial Planner's Bible: The Advisor's Advisor draws upon Jeffrey Rattiner's own considerable, celebrated experience in the industry and the hundreds of interviews with the nation's top planners from the CFP, CPA, brokerage, banking, insurance, and legal communities resulting from his extensive travels and nationwide training programs. In this all-encompassing self-contained stand-alone resource and deskbook, Rattiner presents a superior blueprint for planning success by telling it the way it really is and what you can do to make it work to your advantage. Rattiner's Financial Planner's Bible presents the best practices of financial advisors in all aspects of financial planning, asset management, practice management, and product marketing. The features of this authoritative guide include: 50 insightful, yet largely ignored, ways of marketing a practice 25 intriguing methods for developing a practice's infrastructure Guidelines to creating external alliances and mutually beneficial relationships A detailed self-assessment system to quantify where a practice is today and where it can go tomorrow The twenty-first-century practice (organization and structure) Worksheets, engagement letters, client checklists, software resources, and other operating tools integral to a successful practice's day-to-day operation Above all, Rattiner identifies "doing what's best for the client" in an ethical, practical manner as a planner's paramount responsibility, emphasizing its importance over personal image, office accoutrements, and even compensation. By focusing on client honor and advisor integrity, the planner's profits will coincide with the client's financial success, creating the ultimate win-win situation. After all, he constantly reminds us that there is enough money in it for all of us. Rattiner's Financial Planner's Bible shows advisors the pitfalls to avoid, the issues to contemplate, the steps to consider, and the hard decisions to make while remaining focused on increasing a practice's profitability and advancing it to the next level. By implementing Rattiner's best practices, planners will not only expand their business but also, more importantly, make their clients' lives better.

From the Back Cover"Jeff Rattiner has found another way to help producers. This book is a must-have for financial advisors, especially those that aspire to be Million Dollar Producers." ndash;Thomas B. Gau, CPA, CFP President and CEO of Million Dollar Producer "Jeff Rattiner has done it again! His book displays all the essential tools and techniques necessary for advanced planners to succeed in this business. Rattiner's easy-to-read style provides the best in marketing and practice management ideas. This book will help you if you have hit a dead end in your practice. Rattiner tells it like it is by providing a no-nonsense approach to truly taking your practice

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About the Author JEFFREY H. RATTINER, CPA, CFP, MBA, RFC, is President of the JR Financial Group, Inc., a multipurpose holding company serving consumers and the financial services industry. He has created Financial Planning Fast Track, an innovative and accelerated educational program assisting students in satisfying the rigorous CFP Certification Examination requirements. He has been a leading trainer for financial services companies such as Wells Fargo, SunAmerica, Merrill Lynch, First Tennessee, the AICPA, California CPA Education Foundation, and TIAA-CREF. He is the author of *Getting Started as a Financial Planner*, the editor in chief of *Personal Financial Planning Monthly*, and a columnist for *Financial Planning* magazine. He can be reached at jeff@jrfinancialgroup.com or (720) 529-1888.